



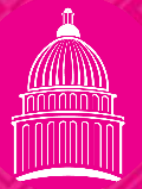
T-Mobile

State Responses to Changes in Telecom Policy

41st Annual National Conference
of Regulatory Attorneys

April 25, 2018

Dave Conn
Vice President, State Government Affairs



Our Company

- 3rd largest national wireless carrier
- Headquartered in Bellevue, WA
- Employs 50,000 nationally; 5,400 in California
- 62% of workforce is ethnically diverse and 42% are women
- Two major brands: T-Mobile and MetroPCS
- Leads the wireless industry by changing it to the benefit of consumers

Our Customers

- 72.6 million nationally; 12 million in California
- Younger than the industry average and more ethnically and economically diverse than our competitors
- Four consecutive years of over 5 million customers added each year

Our Network

- Fastest Network –Independent industry benchmarking company OpenSignal in 2018 recognized T-Mobile for once again having the best network in the nation. Additionally, Speedtest by Ookla named T-Mobile's LTE network in 2018 as the fastest for the 16th quarter in a row.
- Expanded Coverage – Our LTE network now covers 322M people nationally, nearly tripling since 2015.

Un-carrier Moves to Change the Industry



3



SIMPLE CHOICE & MOBILE WITHOUT BORDERS

MARCH 2013

No annual service contracts, limits or overages

AMPED JULY 2015: coverage in three countries for the price of one.



SIMPLE GLOBAL

OCTOBER 2013

The world is your network—unlimited data and texting and 20c/min calling in 140+ countries and destinations.



LIFETIME COVERAGE GUARANTEE

JUNE 2014

AMPED SEPT. 2015: Guaranteed satisfaction with your coverage for as long as you're a customer.



Wi-Fi UNLEASHED

SEPTEMBER 2014

Call and text over any Wi-Fi connection for seamless coverage where no cellular network reaches.



UN-CARRIER FOR BUSINESS

MARCH 2015

100% transparent pricing and benefits for businesses of all sizes.



#GETTHANKED

JUNE 2016

The carriers give you attitude. The Un-carrier gives you gratitude. No strings attached.



NEW RULES

JANUARY 2017

Ended the carriers' bogus monthly taxes & fees, abolished price hikes and pays you back for unused data.



JUMP! & JUMP!™ ON DEMAND

JULY 2013

Upgrade your phone when you want, not when you're told.

AMPED JUNE 2015: switch whenever you want and pay nothing upfront on base models.



CARRIER FREEDOM

JANUARY 2014

We'll pay your early termination fees or pay off your device when you switch.



MUSIC FREEDOM

JUNE 2014

Stream music without using your high-speed data.



DATA STASH

DECEMBER 2014

Roll your unused data forward for 12 months. Don't lose what you don't use!



BINGE ON™

NOVEMBER 2015

Stream unlimited video from dozens of providers without using high-speed data. Watch up to 3X more video from all other providers.



T-MOBILE ONE

AUGUST 2016

The Internet is meant to be Unlimited.

Un-carrier Recognition

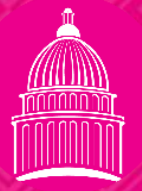


WORKPLACE

- Named by *Fortune* as one of the 100 **Best Companies to Work For**.
- Recognized as one of the **Best Employers for Diversity** by Forbes.
- Human Rights Campaign named T-Mobile a **Best Place to Work for LGBT Equality** for the last 5 years.
- Designated 11 times as a top **Military Friendly Employer** by Military Friendly.
- Recognized 10 years straight as one of the **World's Most Ethical Companies** by the Ethisphere Institute.

CUSTOMER SERVICE

- T-Mobile and MetroPCS both received the **highest ever scores** in the 2018 J.D. Power U.S. Wireless Customer Care Performance Studies.
- T-Mobile and MetroPCS also **topped the lists** of the 2018 J.D. Power U.S. Wireless Purchase Experience Studies.
- T-Mobile consistently ranked #1 in **overall customer satisfaction and likelihood to recommend** in 2017 according to the latest national survey from HarrisX (formerly Nielsen).
- T-Mobile ranked #1 in **overall customer satisfaction** by YouGov Brand Index throughout 2017.



- Federal universal service policy
- Wireless deployment
- Small Cell deployment



- Federal shift on policy
- State Reactions
 - Legislation
 - Executive Orders
- Technological Differences?



- Federal shift on policy to favor facilities-based providers
- Effect on lifeline users?



Questions?



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